

AGENDA
EXCOMM MEETING
Trusts and Estates Section
State Bar of California

June 3, 2006
LAX Marriott
9:30 a.m. to 3:30 p.m.

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"I was an attorney, yes, but I was also one heck of a nice guy."

WELCOME, INTRODUCTIONS AND REPORTS OF CHAIR/VICE CHAIR

- 1 Welcome & Introductions [POTTS]
- 2 Approval of Minutes of April Meeting [POTTS]
- 3 Report of Chair [POTTS]
- 4 Report of Vice Chair [HARTOG]
- 5 Report of Section Administrator [ORLOFF]

II ADMINISTRATIVE MATTERS

- 1 Finance and Budget - Financial Report [HARTOG]
- 2 Nominating Committee [FITZPATRICK]

III COMMITTEE, TASK FORCE AND LIAISON REPORTS

- 1 Income and Transfer Taxes [HAYES]
 - a Legislative Bills
 - (1) Property Taxation
 - (a) SB 1607 - Property Taxation (follow)
 - (b) AB 2799 - Sibling Transfers (follow)
 - (2) Income and Corporation Taxes - SB 1713
 - (follow)
 - b Federal Legislative Developments
- 2 Ethics Committee [HORTON/LODISE]
 - a Report of Liaison to Rules Revision Commission/
B&PC § 6068.5 [Stern/Lodise]
 - b Status of Ethics Guide Update (target: annual
meeting)
- 3 Quarterly [STREISAND]
 - a Summer 2006 Issue
 - b Fall 2006 Issue
 - Solicitation of articles
 - d Advertising [Hayes]
- 4 NCCUSL [HENDEN]
 - a Uniform Trust Act/Professor English [Moore]
 - b Uniform Prudent Management of Institutional Funds
Act

5 CEB [GOOD]
a Upcoming Programs

6 Education [ALBERIO]
a State Bar Annual Meeting Programs
b Stand Alone programs
(1) International Estate Planning [Ito]
(2) Form 706 Preparation [Orloff/Tong]
c 2007 Winter SEI
d Your Legal Rights [Tong]

7 Membership & Marketing [LAWSON]
a Membership count
b Marketing of education programs
c Staffing tables at MCLE programs

8 Legislation [REGGIARDO]
a Timeline for response to pending bills
b Timeline for TEEComm legislative proposals
c Mandatory procedures re legislative proposals
d Online Bill Tracking legislative information:
www.leginfo.ca.gov/

IMPORTANT GUIDELINES:

- Please use approved format for legislative proposals.
- Please use approved comment form for legislation comments.
- Always write to Larry Doyle, not directly to a member of legislature or legislative staff.
- Confirm testimony needs with Legislation Chair.
- If you agree to testify, be there unless otherwise notified

9 Trust & Estate Administration Committee [DOCKER]
a Legislative Bills
(1) AB 2864 - Statute of Limitations (follow)
(2) SB 2267 - Probate Limitation Increases
(support, recommend amendment [Hand])
b Our Pending Legislative Proposals
(1) AB 2347 - UPAIA cleanup [Burger]
(2) AB 2042 - Trustee Removal for Incapacity
[Horton]
c Projects
(1) Arluk/Dobler & Trust Creditor Claim Issues
[Wallet]

(2) Creditor Claim Harmonization (BOG approved,
re-submit to Leg) [Hartog]
(3) Attorney Fee Shifting Consolidation
Provision

- 10 Estate Planning Committee [PAYNE]
a Legislative Bills
(1) AB 69 - Multiple Party Accounts - (support
if amended) [MacDonald]
(2) AB 2658 - Tangible Personal Property
(support if amended) [Wallet/Jaech]
(3) SB 1272 - Advance Healthcare Directives
(follow) [MacDonald]
b Our Pending Legislative Proposals
(1) AB 2034 - Certificate of Independent Review
[Moore]
c Projects
(1) Government Code Section 8201
(2) Certificate of Independent Review [Moore]
- 11 AB 651 - California Compassionate Choices Act Task
Force [TONG]
(technical amendments)
- 12 Educating Seniors [COREY]
a Legislative Bills
(1) SB 308 Recording Fees: Elder and Dependent
Adult
Financial Abuse (support) [Pollard]
(2) SB 192: Annuity Sales to Seniors/Suitability
Standards
(support) [Corey]
b Projects
(1) Elder Abuse Brochure [Corey/Tong]
(2) Information Card and Senior Outreach Program
[Tong]
(3) Coordination with Office of Emergency
Services [Pollard]
- 13 Conservatorship/Guardianship Reform Act Task Force
[STERN/LODISE]
a AB 1363 - Omnibus conservatorship and
guardianship reform act
(oppose unless amended) [Lodise/Stern]
b SB 1116 - Least Restrictive Residence, Sale of
Residence Amendments

- (support if amended) [Stern/Lodise]
- c SB 1550 - Professional Fiduciaries Act (support if amended) [Corey/Wallet]
- d SB 1716 - Ex Parte Communications in Conservatorship Proceedings (oppose unless amended) [Lodise/Wallet]
- e Privacy Issues in Protective Proceedings [Lodise]

14 Incapacity [STERN]

- a Legislative Bills
 - (1) AB 2340 - Healthcare Surrogates (BLS 2006-05) (support) [Stern]
 - (2) SB 1280 - Incapacitated persons (oppose) [Corey/Stern]
 - (3) SB 1609 - Reverse mortgages: annuities (support) [Corey/Tong]
 - (4) AB 3013 - HIPAA (opposition withdrawn) [Horton/Beltran]
 - (5) SB 1197 - DHS Notice of Death (support if amended) [Stern/Burger]
- b Our Pending Legislative Proposals
 - (1) SB 1307 - HIPAA Conformity [Horton]
 - (2) AB 2042 - Trustee Removal for Incapacity [Horton]
- c Medi-Cal Update - State Regulation Status
- d Projects
 - (1) PC § 1470 - Appointed counsel for already represented [Beltran]
 - (2) PC §§ 2590, 2591 - Independent powers of conservator [Green]
 - (3) Investment Standards (BOG approved, re-submit to Leg)

15 Litigation Committee [KOVAR]

- a New cases
- b Projects
 - (1) Proposed model ADR rules [Henden]
 - (2) Rule of Court 1622(d) [Horton]
 - (3) McAdams and Borissoff

16 CLRC Committee [MOORE/STREISAND]

- a No Contest Clause Study [Kovar]
- b Family Law Money Judgments/Enforcement After Death - AB 2126 (support) [Moore]
- c Revocable Deed Study [Ito/MacDonald]
 - (1) Litigation Committee report [Zabronsky]
 - (2) Incapacity Committee report

(3) T&E Administration Committee report

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| 17 | Computer/Internet | [GAW] |
| | a Website Protocols | |
| 18 | Conference of Delegates | [TONG] |
| 19 | Family Law Liaison | [MOORE] |
| 20 | New Business | |
| 21 | COMING ATTRACTIONS | |

FUTURE EXCOMM EVENT
October 8, 2006
Monterey